

Attorney Neilson, Bruce A. (for Petitioner Teresa Ramirez, Administrator with Will Annexed)

First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance to Attorney of Compensation for Ordinary Services, and for Final Distribution

DOD: 12/1/2009		TERESA RAMIREZ , daughter and Administrator with Will Annexed, is Petitioner. <u>Account period: 9/2/2010 – 8/5/2015</u> Accounting - \$105,000.00 Beginning POH - \$105,000.00 Ending POH - \$105,000.00 <i>(no cash)</i> Administrator - waives Attorney - \$750.00 <i>(less than statutory of \$4,150.00; to be paid outside probate;)</i> Distribution pursuant to Decedent's Will is to: <ul style="list-style-type: none"> • TERESA RAMIREZ – 1/3 interest in real property; • HOLLIE M. ARREGUIN – 1/3 interest in real property; • DANNELLE D. MILLER – 1/3 interest in real property. 	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg X		
<input type="checkbox"/>	Aff.Mail X		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 090210		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: LEG Reviewed on: 9/1/15 Updates: 9/3/15 Recommendation: SUBMITTED File 1 – Miller	

2 **Ida Sue Blankenship (Estate)** **Case No. 11CEPR00225**
Atty **Franco, Paul C. (for Deborah Kamine – Executor)**
Status Hearing Re: Account/Report of Executor on Waiver of Account
and Petition for Distribution

DOD: 01/17/11	DEBORAH KAMINE , daughter, was appointed Executor with full IAEA authority and without bond on 05/12/11. Letter Testamentary were issued on 05/12/11.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 06/09/2015: Counsel requests an additional 60-90 days. If the petition is filed at least two court days prior, then no appearance is necessary.
	Inventory & Appraisal, final, filed 10/11/13 - \$198,712.13	1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 012414, 041814, 052314, 072214, 081914, 102814, 012715, 040715, 060915	Minute Order from status hearing on 10/25/13 set this matter for status regarding filing the Account/Report of Executor on Waiver of Account and Petition for Distribution.	
Aff.Sub.Wit.	Former Status Report (not verified) filed 10-27-14 by Attorney Franco states at the last status hearing, the Court was informed that there was a delay in closing the estate due to an approximate seven-month wait time with the State of California Unclaimed Property Division for certain Merrill Lynch accounts that had been turned over to the state. At this time, the executor is still waiting on those funds. The Unclaimed Property Division is unable to provide an expected time other than what was previously reported. The estate is otherwise in a position to close and resolution has been reached with beneficiaries regarding assets and the large amount of reimbursement sought by the executor. The funds mentioned herein are needed for the resolution, though, which prevents a partial distribution. Petitioner would appreciate a further continuance of 60 days.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt	Please see additional page	Reviewed by: LV
UCCJEA		Reviewed on: 09/02/2015
Citation		Updates: 09/04/2015
FTB Notice		Recommendation:
		File 2 – Blankenship

Former Status Conference Statement filed 01/26/2015 states there still exists a delay in closing the estate due to a delay in receiving money from the State of California Unclaimed Property Division for certain Merrill Lynch accounts of the decedent that had been turned over to the State. At prior hearings on this matter, the Court was informed that the Unclaimed Property Division informed the Executor that there was an approximate 7 month waiting time from application for unclaimed property to receipt of funds. The claim was made in July of 2014, and was resubmitted in November due to certain errors in the original claim. As of the time of the filing of this status report, the Executor is still waiting for those funds from the State of California. The Executor received the notices attached as Exhibit A from the Unclaimed Property Division. That the State is backed up due to budget cuts and shortage of staff.

The estate is otherwise in a position to close, however, the funds from the Unclaimed Property Division represent the only liquid cash assets of the estate. A resolution has been reached with beneficiaries regarding the Estate assets and the large amount of reimbursements sought by the Executor. The funds from the Unclaimed Property Divisions unfortunately are needed for the resolution, preventing a partial Petition for Final Distribution, Petitioner would appreciate a further continuance of 60-90 days.

Status Report filed 06/08/2015 states on 05/15/2015, the Executor received a letter from State Controller advising that the claim for Dow Chemical stock, or cash equivalent, was approved. As stated in the letter, the Claims Unit needs to research the history of the security in order to determine its value. The letter goes on to state the process of researching the claim value can take up to 9 months for stocks requiring more extensive research. The estate is otherwise in a Petition to close, however, the funds from the Unclaimed Property Division represent the only liquid cash assets of the estate. The funds from the Unclaimed Property Divisions unfortunately are needed for the resolution, preventing a partial Petition for Distribution. The Dow stock was valued at approximately \$8,500 in the first and final Inventory and Appraisal. It will take another 90 days before the value of the Dow Stock is known. Petitioner would appreciate a further continuance of 60-90 days.

Status Report filed 09/04/2015 states Executor is still waiting on the State of California Unclaimed Property Division to distribute the proceeds from the Dow Chemical stock which was held in Merrill Lynch accounts of the decedent but turned over to the state.

In the last status conference statement, the Executor reported that on approximately May 15, 2015, she received a letter from the State Controller advising that the claim for Dow Chemical stock, or cash equivalent, was approved. The letter further stated that the Claims Unit needed to research the history of the security in order to determine its value. The letter went on to state the process of researching the claim value can take up to 90 days, potentially up to 9 months for stock requiring more extensive research.

In May of this year, the Claims Unit requested further information from the Executor regarding the processing of the claim. Mr. Franco provided that information, and had several communications with that Department to work out those issues. In July, the Claims Unit sent the Executor two checks, one for \$3.66 and the other for \$431.34, supposedly representing the value of the Dow stock. This was obviously wrong, for which Mr. Franco contacted the Claims Unit. On approximately 07/23/2015, Mr. Franco was finally able to straighten out the misunderstanding. The principal balance, approximately \$13,923 (\$51/share @ 273 shares) is still being researched by the Claims Unit, and the Executor continues to wait for that amount.

Please see additional page

In the meantime, in the attempt to bring a closure to the Estate now without waiting further, the Executor made offers to the other beneficiaries of the Estate to buy out their interest in the Estate. The offer was based upon the approximate beneficial value after payment of attorney's fees and costs and reimbursements to the Executor. Unfortunately, not all beneficiaries accepted the offer. As a result, Executor has now listed the real property in the Estate for sale with real estate broker Boyd Realty. It had previously been expected the real property would be able to be distributed in kind, making the need for sale unnecessary. However that position has changed since the offers to the beneficiaries have been rejected and the keeping of the house no longer desired. So the Estate will now be completely liquidated.

Petitioner would appreciate a further continuance of 60-90 days to allow time to receive the proceeds from the Dow Chemical Stock from the State of California, and to sell the real property. Once these two issues are resolved, the Estate will be in a position to close.

3 Ben H. Smith & Dorothy Jean Smith (CONS/PE) Case No. 11CEPR00782

Attorney Krbechek, Randolph (for Mike "Butch" Smith, Jr. – grandson/Petitioner)
 Attorney Amador, Catherine A (for Michael H. Smith, Sr. – son)
 Attorney Kruthers, Heather H (for Public Guardian – Conservator)

Petition for Attorney's Fees

		CATHERINE AMADOR , attorney for MICHAEL H. SMITH, SR. ("Mike"), son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: This petition pertains to the Conservatorship of Ben Smith.
		PUBLIC GUARDIAN was appointed Conservator of the Person and Estate on 01/18/13.	
Cont. from		Petitioner states that she has represented Mike since May 2012 when he and his daughter Jenna Smith ("Jenna") hired her to attempt to resolve issues of isolation and neglect of BEN H. SMITH ("Ben"). At that time, Ben was living in his own residence with his grandson Michael H. Smith, Jr. ("Butch") and Butch's mother. Ben's wife DOROTHY JEAN SMITH ("Jean") had recently been conserved and was residing in a nursing facility at that time.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Petitioner attempted to resolve numerous issues which arose between Mike and Jenna and other family members and friends on one hand and Butch on the other.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Petitioner requests fees in connection with the representation of Mike and Jenna throughout the numerous hearings and proceedings that were held during the pendency of this matter.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner asks that she be paid from the conservatorship estate for 68.6 hours @ \$250/hr. equaling \$17,150.00 as reasonable compensation for the services performed and provided, plus reimbursement for costs in the amount of \$891.00 for a total request of \$18,041.00.	
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.	Services are itemized by date and include preparation of documents, meetings with clients, correspondence/working with County Counsel and Counsel for the Conservatee, attendance at hearings.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 09/01/15

Updates:

Recommendation:

File 3 – Smith

Attorney Istanbulian, Flora (for Janice Atwater-Epperson, Administrator with Will Annexed)

Probate Status Hearing Re: the Filing of the First Account and/or Petition for Final Distribution

DOD: 3/19/2014	JANICE ATWATER-EPPERSON , daughter, was appointed Administrator with Will Annexed with Full IAEA authority without bond on 7/8/2014.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Letters issued on 7/8/2014.	
<input type="checkbox"/> Aff.Sub.Wit.	Pursuant to Probate Code § 8800(b) , <i>Final Inventory and Appraisal</i> was filed 11/12/2014 showing an estate value of \$380,757.45 .	
<input checked="" type="checkbox"/> Verified		
Inventory	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 7/8/2015 .	
PTC		
Not.Cred.	Minute Order dated 7/8/2014 from the hearing on the petition for probate set this status hearing on 9/8/2015 for filing of the first account and/or petition for final distribution.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
Aff.Pub.	Status Report filed 8/17/2015.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
<input checked="" type="checkbox"/> Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 9/1/15
		Updates:
		Recommendation:
		File 4 – Jackson

Attorney Mele, James J. (for Executor Juan Carlos Valencia, Jr.)

**Probate Status Hearing Re: the Filing of the First Account and/or
Petition for Final Distribution**

DOD: 3/21/2014	JUAN CARLOS VALENCIA, JR. , son, was appointed Executor with Full IAEA authority without bond on 7/7/2014.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Letters issued on 7/10/2014.	
<input type="checkbox"/> Aff.Sub.Wit.	Pursuant to Probate Code § 8800(b) , <i>Final Inventory and Appraisal</i> was filed 7/22/2014 showing an estate value of \$200,000.00 .	
<input checked="" type="checkbox"/> Verified	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 7/10/2015 .	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Minute Order dated 7/7/2014 from the hearing on the petition for probate set this status hearing on 9/8/2015 for filing of the first account and/or petition for final distribution.	
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Declaration of James J. Mele Re Status filed on 8/13/2015 .	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input checked="" type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 9/1/15
		Updates:
		Recommendation:
		File 5 – Ledesma

Attorney De Goede, Dale A. (for Successor Co-Executors Christopher Miller and Brian Miller)

Probate Status Hearing Re: Filing of the First Account

DOD: 2/21/2014	CHRISTOPHER MILLER and BRIAN MILLER , sons, were appointed Successor Co-Executors on 3/12/2015, following the death of Executor MARGARET A. MILLER (DOD 1/18/2015.)	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Order For Final Distribution on Waiver of Accounting was filed 3/12/2015.</i>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 9/1/15
		Updates:
		Recommendation:
		File 6 – Miller

Petitioner Hernandez, Jose Luis, Jr. (pro per – non-relative/Petitioner)

Petitioner Hernandez, Juana Hernandez De (pro per – non-relative/Petitioner)

Petition - Appoint Guardian of the Person

Jazmine, 16	TEMPORARY EXPIRES 09/08/15		NEEDS/PROBLEMS/COMMENTS:
Mateo, 11	JOSE LUIS HERNANDEZ, JR. and JUANA HERNANDEZ , non-relatives, are Petitioners.		CONTINUED FROM 07/28/15 As of 09/01/15, nothing further has been filed and the following notes remain:
	Father: MIGUEL GARCIA – Declaration of Due Diligence filed 05/27/15		
Cont. from 062315, 072815	Mother: KARLA ARAUJO BARRERA – personally served on 05/26/15		1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Miguel Garcia (father) – personal service needed* b. Leo Garcia Heudade (paternal grandfather) – service by mail sufficient* c. Marta Garcia Heudade (paternal grandmother) – service by mail sufficient* d. Rafael Curado Linares (maternal grandfather) – service by mail sufficient* * Unless diligence is found, declarations of due diligence filed 05/27/15 state that the whereabouts of these individuals is unknown
Aff.Sub.Wit.		Paternal grandfather: LEO GARCIA HEUDADE – Declaration of Due Diligence filed 05/27/15	
✓ Verified		Paternal grandmother: MARTA GARCIA HEUDADE – Declaration of Due Diligence filed 05/27/15	
Inventory		Maternal grandfather: RAFAEL CURADO LINARES – Declaration of Due Diligence filed 05/27/15	
PTC		Maternal grandmother: MARIA RAMIREZ – deceased	
Not.Cred.		Siblings: RUBY HERNANDEZ (6), DANIEL HERNANDEZ (2)	
Notice of Hrg	x	Petitioners state [see Petition for details].	
Aff.Mail	x	Court Investigator Julie Negrete filed a report on 06/16/15.	
Aff.Pub.		DSS Social Worker Maria Holguin's report was received on 07/27/15.	
Sp.Ntc.			
✓ Pers.Serv.	w/		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 09/01/15
			Updates:
			Recommendation:
			File 7 – Araujo & Barrera

Petitioner

Ervin A. Palacios Cabrales (Pro Per – Step-Father – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 7/28/15:</u> The Court dispenses with notice to the unknown father and paternal grandparents. The maternal grandparents are to be properly noticed. As of 9/2/15, nothing further has been filed. The following issue remains: 1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Efrain Basilio (maternal grandfather) - Gloria Leticia Benavides (maternal grandmother)
Cont. from 072815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 9/2/15
				Updates:
				Recommendation:
				File 8 – Basilio

9A **L. Ruth Buchman Credit Bypass Trust Case No. 15CEPR00609**
Attorney Magness, Marcus D. (for Jeri Buchman Weil – Trustee – Petitioner)
Attorney Brennan, Stacey (of Sacramento, for Objectors Jan van Lienden and Jill Buchman)
Petition to Approve: (1) First Account and Report; and (2) Second and Final
Account and Report; and Petition for Instructions [Prob. Code §17200(b)(5), (b)(6)]

Ruth Buchman DOD: 12/9/01		See petition, objections for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 7/28/15:</u> Continued due to the late filed objection. Ms. Brennan represents that she will also be filing a Breach of Trust petition. Counsel is to come on 9/8/15 prepared with an agreed upon Tuesday for trial assignment.	
Roy Buchman DOD: 12/13/13				
Cont. from 072815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/2/15	
			Updates:	
			Recommendation:	
			File 9A – Buchman	

9A

Status RE: Trial Setting

			NEEDS/PROBLEMS/COMMENTS: <u>Update:</u> On 9/2/15, Jan van Lienden and Jill Allison Buchman filed a Petition for Relief from Breach of Trust which is set for hearing on 10/15/15. 1. Need status re date.
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

JERI BUCHMAN WEIL filed Petition to Approve: 1) First Account and Report; and 2) Second and Final Account and Report; and Petition for Instructions on 6/17/15.

JAN VAN LIENDEN and JILL BUCHMAN filed Objections on 7/27/15.

At the hearing on 7/28/15, the Court directed counsel to come on 9/8/15 prepared with an agreed upon Tuesday date for trial assignment.

Reviewed by: skc

Reviewed on: 9/2/15

Updates: 9/3/15

Recommendation:

File 9B – Buchman

10 Ariel Flores (GUARD/P)**Case No. 15CEPR00659**

Petitioner Ingram, Eric Deon (Pro Per – Paternal Step-Grandfather)

Petitioner Ingram, Maritza Montejano (Pro Per – Paternal Grandmother)

Petition for Appointment of Guardianship of the Person

Age: 4		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>MARITZA INGRAM, paternal grandmother, and ERIC INGRAM, paternal step-grandfather, are petitioners.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv. n/a		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 09/02/2015	
		Updates:	
		Recommendation:	
		File 10 – Flores	

11 Savanna Watts, Sandra Watts (GUARD/P) Case No. 15CEPR00661

Petitioner: Jessica Lyann Watts (pro per)

Petition to Appoint Guardian of the Person

		TEMPORARY EXPIRES 9/8/15	NEEDS/PROBLEMS/COMMENTS:
		JESSICA LYANN WATTS , sister, is petitioner.	<div>1. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice for: a. Dawn Watts (mother) b. Savana Watts (minor)</div>
Cont. from		Please see petition for details.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Court Investigator Report filed on 9/1/15	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 9/3/15
			Updates:
			Recommendation:
			File 11 – Watts

12 Abigail Bautista, Khloe Bautista (GUARD/P) Case No. 15CEPR00662

Attorney: Alfred A. Gallegos (for Petitioners Christino Romero and Julia Romero)

Attorney: Hallie S. Ambriz (for Objector/father Edgar Bautista)

Petition for Appointment of Guardian of the Person

		THERE IS NO TEMPORARY	NEEDS/PROBLEMS/COMMENTS:
		CHRISTINO ROMERO and JULIA ROMERO, maternal grandparents, are petitioners.	1. Proof of service on the paternal grandmother, Guadalupe Bautista does not indicate that the Notice of Hearing was served with a copy of the petition as required.
Cont. from		Please see petition for details.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Objections of Father, Edgar Bautista filed on 7/17/15 and 8/4/15.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Court Investigator Julie Negrete's Report filed on 8/31/15.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 9/2/15
Updates:
Recommendation:
File 12 – Bautista

13 Bri'leeah Cooks (GUARD/P) Case No. 15CEPR00666

Petitioner Morson, Areka (pro per – paternal grandmother)

Petition for Appointment of Guardianship of the Person

Age: 6 mos.	TEMPORARY EXPIRES 09/08/15		NEEDS/PROBLEMS/COMMENTS:
	AREKA MORSON, paternal grandmother, is Petitioner.		
	<u>Please see petition for details</u>		<p>1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> Brian Cooks (Father) <p>Note: Brian Cook was personally served on 09/01/2015, only 7 days prior to the hearing and not the 15 days as required.</p> <ul style="list-style-type: none"> Desire Hernandez (Mother) – Unless the Court dispenses with notice. <p>Note: Declaration of Due Diligence filed 09/02/2015 states petitioner received a text message from the mother stating petitioner would see her in court.</p>
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			<p>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> Deric Cooks (Paternal Grandfather) Maternal Grandfather (Not Listed) Mary Hernandez (Maternal Grandmother)
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			<p>Reviewed by: LV</p> <p>Reviewed on: 09/02/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Cooks</p>
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail		x	
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.		w/	
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

14 James Martin Temple, Jr. and Bobbye Sisk Temple Family Trust
Case No. 15CEPR00720

Attorney Coleman, William H. (for Petitioner James Martin Temple, Jr., Trustee)

**Petition for Order Approving Modification of Trust Terms under
 Probate Code Sections 15403, 15409, 17200**

Bobbye DOD: 6/16/2014	JAMES MARTIN TEMPLE, JR. , Settlor and Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states:	<p>OFF CALENDAR Request for Dismissal entered as requested on 9/4/2015.</p> <p>1. Paragraph 5 of the <i>Petition</i> states all of the presumed remainder beneficiaries, being Petitioner and Bobbye's children and grandchildren, with the exception of ANNE ELIZABETH TEMPLE DEFFEBACH (age 17), have consented to the proposed modification. <i>Petition</i> goes on to state that the interests in the subject of this <i>Petition</i> of the presumed remainder beneficiaries are identical to those of their issue, including ANNE ELIZABETH TEMPLE DEFFEBACH and the Settlor's other unborn issue, and therefore such unborn issue and other ascertained beneficiaries are adequately represented and no guardian ad litem is needed. Based upon Petitioner's submission of signed consents from all of the adult presumed remainder beneficiaries, the Court may require a guardian ad litem be appointed for the minor granddaughter, ANNE ELIZABETH TEMPLE DEFFEBACH, and for any of the Settlor's unborn issue.</p>
<input type="checkbox"/> Aff.Sub.Wit.	<ul style="list-style-type: none"> On 4/14/1998, Petitioner and his wife, Bobbye Sisk Temple, executed the JAMES MARTIN TEMPLE, JR. AND BOBBYE SISK TEMPLE FAMILY TRUST as Settlor's, which they amended and restated on 9/9/2003 (<i>copy of amended trust attached as Exhibit A</i>); Petitioner is the surviving spouse of Bobbye and the sole current beneficiary under the Trust, and all subtrusts which may be established under it; Petitioner and Bobbye have 4 children: KARIN SISK TEMPLE, ERIC MARTIN TEMPLE, GRETCHEN TEMPLE LOUDEN and LISA M. BROTT; and 3 grandchildren: KATHRYN SISK TEMPLE DEFFEBACH, SARAH GREENE TEMPLE DEFFEBACH, and ANNE ELIZABETH TEMPLE DEFFEBACH [<i>a minor</i>]; it is unlikely that there will be any other grandchildren; Signed consents to the <i>Petition</i> are attached as <i>Exhibit B</i>, except from ANNE ELIZABETH TEMPLE DEFFEBACH, minor granddaughter; Petitioner proposes modification of the TEMPLE FAMILY TRUST to allow the allocation of Bobbye's share to the TEMPLE FAMILY TRUST/SURVIVOR'S TRUST rather than to the TEMPLE FAMILY TRUST/BYPASS TRUST; 	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 9/2/15
<input type="checkbox"/> UCCJEA		Updates: 9/4/15
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 14 – Temple

~Please see additional page~

15 Donald J. Long and Marlene J. Long Declaration of Trust dated 7/18/02
Case No. 15CEPR00729

Attorney Esraelian, Robyn L. (for Co-Trustees Mitchell J. Long and Charles C. Long)

Petition for Order Confirming that Property is a Trust Asset

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/2/15	
			Updates:	
			Recommendation:	
			File 15 – Long	

Attorney Thomas, Lanier (for Settlor Marguerite Lindley)

Petition to Terminate Trust and Transfer Corpus to Settlor

See petition for details.			NEEDS/PROBLEMS/COMMENTS: 1. Need order. See Local Rules 7.1.1.F and 7.6.1.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 9/2/15
			Updates:
			Recommendation:
			File 16 – Lindley

Attorney Hergenroether, Michael R. (for Petitioner Lola Elaine Jones)

Petition for Appointment of Limited Probate Conservator

		LOLA ELAINE JONES, great aunt, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Court Investigator's Report filed 8/7/2015.	Note: Notice of Withdrawal of Petition for Limited Conservatorship filed on 8/25/2015 states: <ul style="list-style-type: none"> Petitioner withdraws the Petition for Appointment of Limited Probate Conservator set for hearing on 9/8/2015 at 9:00 a.m. in Dept. 303. Petitioner will re-file the petition in Mariposa County at the recommendation of the Court Investigator.
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 9/2/15
			Updates:
			Recommendation:
			File 17 - Landsberg

18 Paige Jean Gross (Estate)**Case No. 15CEPR00765****Petitioner Garcia, Kevin Michael (Pro Per)****Petition for Letters of Special Administration with General Powers**

DOD: 07/04/2015	KEVIN MICHAEL GARCIA , petitioner, requests the PUBLIC ADMINISTRATOR , be appointed Special Administrator with general powers.		NEEDS/PROBLEMS/COMMENTS: The deficiencies with the pleadings include, but are not limited to, the following: 1. Petition does not provide reason for the request for Letters of Special Administration. 2. Petition requests the Public Administrator be appointed Special Administrator. Need consent for appointment from the Public Administrator. 3. Petitioner is not listed on #8 of the petition as required and it is unclear what the relationship is to the decedent. 4. #5a(3) or #5a(4) was not answered regarding a registered domestic partner. 5. #5a(7) or #5a(8) was not answered regarding issue of predeceased child. 6. Need Orders. 7. Need Letters. Please see additional page for Status Hearings
	Limited Authority – o.k.		
Cont. from	Decedent died intestate		
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno		
<input checked="" type="checkbox"/> Verified	Publication: The Business Journal		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg	Estimated value of the Estate:		
<input checked="" type="checkbox"/> Aff.Mail	w/	Personal property - \$25,000.00	
<input checked="" type="checkbox"/> Aff.Pub.		Real property - \$160,000.00	
<input type="checkbox"/> Sp.Ntc.		Less encumbrances - \$32,500.00	
<input type="checkbox"/> Pers.Serv.		Total - \$152,500.00	
<input type="checkbox"/> Conf. Screen		Probate Referee: Rick Smith	
<input type="checkbox"/> Letters	x		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Reviewed by: LV
Reviewed on: 09/02/2015
Updates:
Recommendation:
File 18 – Gross

Note: If the petition is granted status hearings will be set as follows:

- **Tuesday, 02/09/2016 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Tuesday, 11/08/2016 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Pro Per Petitioner Tony Tapia, Jr. (Pro Per Petitioner, maternal grandfather)

Pro Per Petitioner Kimiki S. Tapia (Pro Per Petitioner, maternal aunt)

Petition for Appointment of Temporary Guardian of the Person

		<u>TEMPORARY EXPIRES 9/8/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		<u>General Hearing set for 10/14/2015</u>	
		TONY TAPIA, JR. , maternal grandfather, and	<u>Continued from 8/24/2015.</u> Minute Order states examiner notes provided in open court; parents are to be properly served.
		KIMIKI S. TAPIA , maternal aunt, are	
Cont. from 082415		Petitioners.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

Continued from 8/24/2015.

Minute Order states examiner notes provided in open court; parents are to be properly served.

1. Need Notice of Hearing and proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, for:
 - Eusebia Mireles, father, if Court does not find due diligence per Declaration filed 8/11/2015; and 8/24/2015.
 - Crystelle Valenzuela, mother, if Court does not find due diligence per Declaration filed 8/11/2015.
2. UCCJEA form filed on 8/11/2015 does not provide residence information for the last 5 years as required.

Reviewed by: LEG**Reviewed on:** 9/1/15**Updates:****Recommendation:****File 19 – Valenzuela**